



WEALTH LEGACY INSTITUTE

Financial Planning Philosophy

Money Secrets: Keys to Smart Investing

WealthLegacyInstitute.com



What is Your Financial Planning Philosophy?

“In the next three to five years, what has to happen for you to feel happy about your progress? ”

1. What is **important** to you? What matters most in **life**? Is it your family? Contributing to others? Remaining healthy and active? Continuing to learn and grow? Think about your priorities in life, not only from a financial standpoint, but also physically (your health), emotionally (how you want to feel about your life), and socially (how you want to give to others).

2. In the next three to five years, what has to happen for you to feel happy about your progress? You might start by thinking about your financial picture, but also consider your family, health, career, and spiritual growth. There are no wrong answers here. One person might be focused on selling his business at a profit, another might want to spend a year after retirement dedicating her expertise to a nonprofit, and someone else might be focused on getting into shape and running a marathon.

“A moment’s insight is sometimes worth a life’s experience.”

-Oliver Wendell Holmes

3. How do you plan to realize your life's **potential**? Do you want to spend more time volunteering as a storyteller at the local library? Do you want to go back to school for a master's in education? Have you wanted to write a novel?

4. What are the best and worst decisions you have made in any area of your life? Have you made financial mistakes? Experienced career highs? Made brilliant choices when it came to children and where to live? Think about your particular **successes** and *failures*.

“What are the best and worst decisions you have made in any area of your life?”

5. What do you want to have **more** of in life? Time? Money? Vacations? Family? What are you passionate about? Where would you like to focus more of your attention?

6. How do you typically make financial decisions? Do you conduct a lot of research? Discuss investments with your spouse? Read financial magazines or websites? Follow the suggestions of neighbors? How—and when—have you gotten *off track* with your finances?

7. If you did not wake up tomorrow, what would you most regret not having done? Is your potential regret related to your family, your health, or your particular talents? What might you need to do now to start achieving this goal?

Summary:

- In the next three to five years, what has to happen for you to feel happy about your progress?
 - What are the best and worst decisions you have made in any area of your life?
 - If you did not wake up tomorrow, what would you most regret not having done?
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Integrated Wealth

Wealth Legacy Institute's *Planning for LIFE Experience™* is the cornerstone of our premier wealth management service.



Portfolio Audit

We can provide you an objective, third-party analysis through our Portfolio Audit.



Digital Portfolios

Our dynamic, online investment management offering can diversify your portfolio to help you reach your goals.



WEALTH LEGACY INSTITUTE

Cherry Tower
950 S. Cherry St Ste.505
Denver, CO 80246

303.753.7578
info@wealthlegacyinstitute.com



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Cherry Tower
950 S. Cherry St. Ste. 505
Denver, CO 80246

303.753.7578
info@wealthlegacyinstitute.com